

The Digital Media Universe

Measuring the Revenues, the Audiences, and the Future Prospects

January 2023



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** Included in this report are slides from a supplementary presentation by Nordicity given at the Digital Media at the Crossroads conference 2023. These slides complement, but are separate, from the Film & TV Production section of this report.*

Introduction

Presented by: Peter Lyman

1.1

Study Mandate & Objectives

MANDATE

- To **gather and present data and information on key trends** in 3 creative sectors.
- To **analyze the potential impact of these trends** on three Canadian creative sectors.

OBJECTIVES

- To set the stage for lively DM@X discussions on policy.
- To do a refresh of the 2022 DM@X report—thus ensuring reporting continuity.
- To stimulate further discussion on policy, strategy, and economics in other venues.

1.2

This Year's Main Themes

WHERE ARE WE IN 2023?



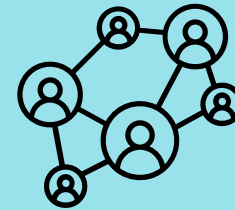
RECOVERY, RESET, RE-EVALUATE

Sectors are grappling to navigate a post-COVID world and adjusting to new realities regarding workforce, consumption, and possible recession.



POLICY SHAKEUP

Impending legislation may have significant impacts on the creative industries in terms of the production and consumption of Canadian content (e.g., Bill C-11, music support programs flexibility, and adoption of tax incentives by other countries).



EQUITY & SUSTAINABILITY

Increased insight into the barriers facing equity-seeking groups and growing environmental concerns are leading to action and sparking new initiatives.

A person in a blue jacket is operating a camera on a film set. The image is overlaid with a semi-transparent blue filter. The person is seen from the side, focused on the camera. The background is slightly blurred, showing some equipment and a person in the distance.

Film & TV Production

Presented by: Peter Lyman and Christiana Puntillo

Film & TV Production | **Key questions**

1. How is **Canada's production industry enduring** as it emerges into a post-pandemic world?
2. How are **streamers adapting** to change and what does that mean for Canada's industry?
3. What can we expect in the aftermath of **Bill C-11**?
4. What are some **workforce challenges** and what is the industry doing to address them?
5. How is the content production industry reacting to needs for progress in **equity and sustainability**?

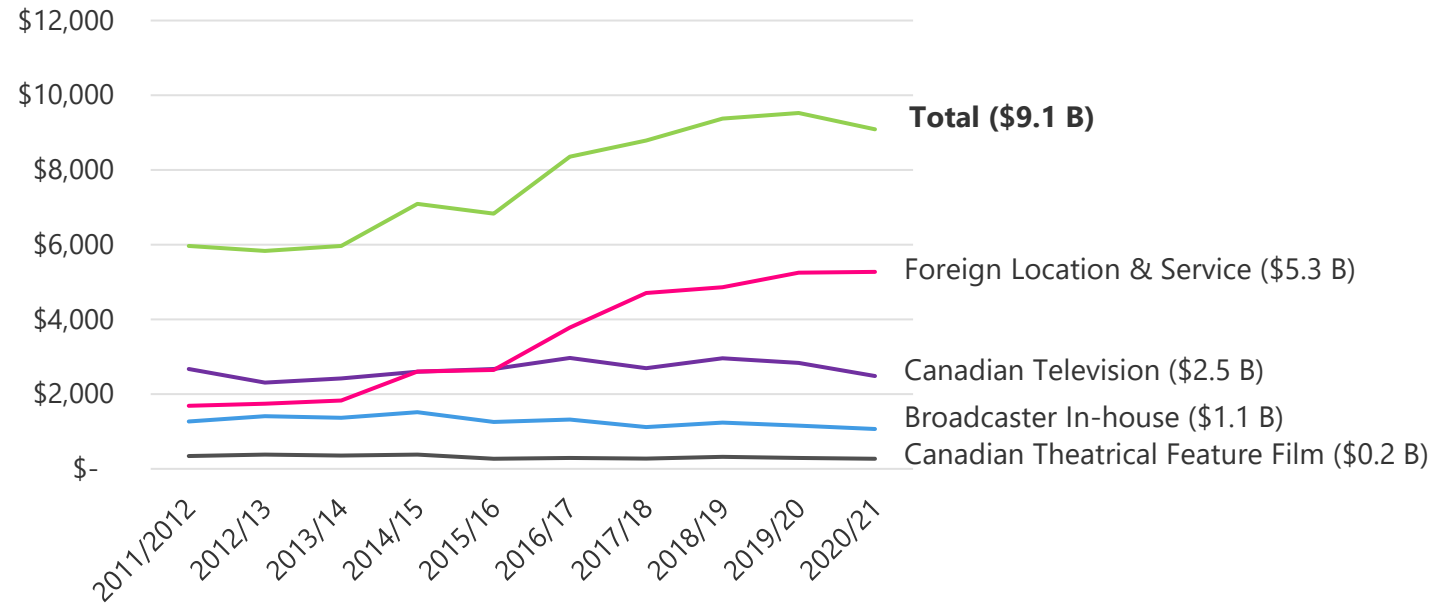
2.1

Industry Overview: Production in Canada

Initial data shows that 2022 figures in Ontario, BC, and Quebec indicate a jump of a billion dollars for Canadian content – but is that simply a catch-up or sign of progress?

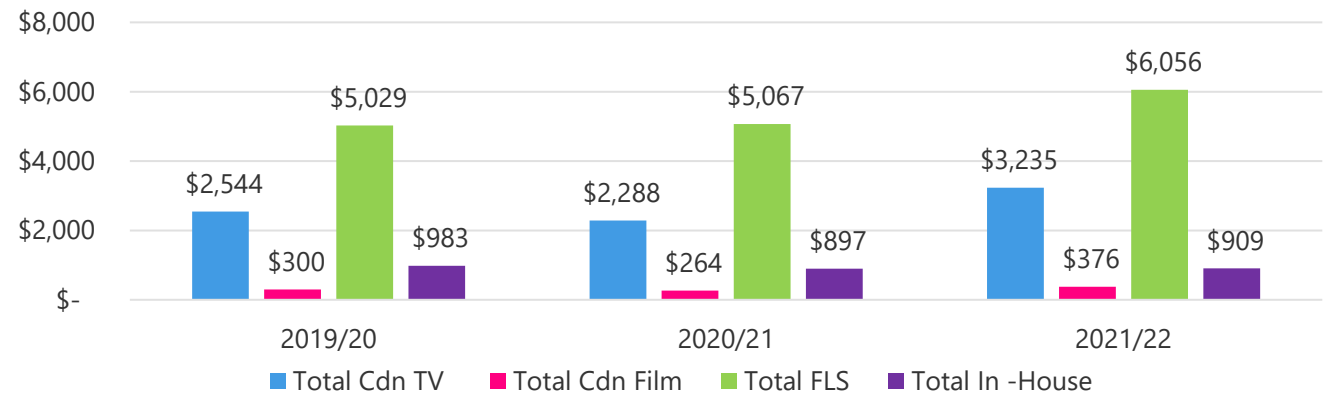
Source: CMPA, *Profile 2021*, Creative BC; Ontario Creates; SODEC

TOTAL PRODUCTION VOLUME IN CANADA 2021 (CAD \$M)



Preview of 2022...

AGGREGATED PRODUCTION VOLUME IN ONTARIO, QUEBEC, AND BC (CAD \$M)



2.2

Streamer Disruption

With more selective and pared-down spending by streamers - and lots more global competition for service production - Canadian producers and provincial incentives must stay competitive.

Source: Ampere Analysis, *Growth in content investment will slump in 2023*

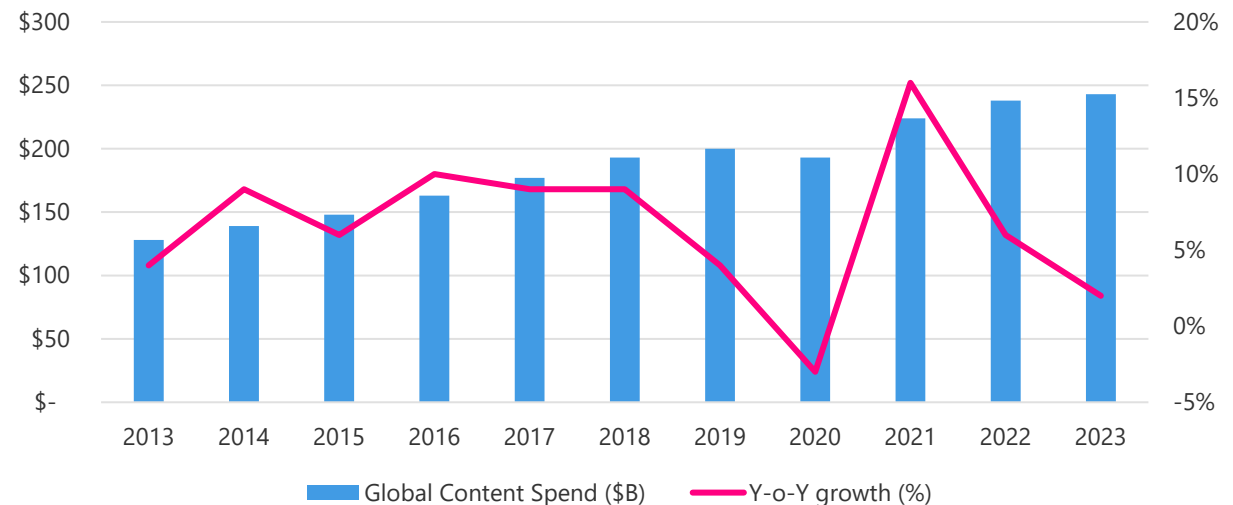
In 2022 we saw...

- Netflix subscriber loss in Q2 2022 triggered stock drop and vow to pull back and refocus on profits.
- Aggressive in cutting costs, series and film cancellations across the board.
- Consumers cancelling subscriptions.
- More emphasis on factual/reality tv

In 2023 we can expect...

- A levelling off - global content spending projected to increase only by 2%.

GLOBAL CONTENT SPEND (USD \$B)

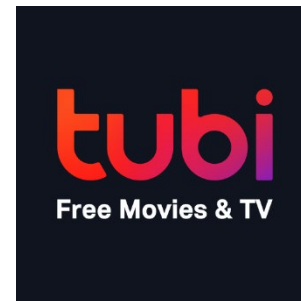


2.3

Age of AVOD/FAST

Although not new, AVOD is on the rise in these inflationary times – it also presents new opportunities for the Canadian industry and may lessen the blow of streamer cutbacks.

- AVOD = Ad-supported video on demand
 - 1) subscription services that offer ad-supported tiers (e.g., Netflix's new ad-supported subscription tier)
 - 2) services that are free to consumers and solely ad-supported (e.g., YouTube)
- FAST = free ad-supported television, offers both linear channels and on-demand content
- AVOD/FAST is growing with consumers because it's free or discounted from the ad-free streaming service - and ads are minimal compared to traditional TV.
- AVOD/FAST presents major new revenue opportunities to the existing streamers as well as new ones that are more pure play AVOD services – which in turn provide new markets for Canadian producers and distributors.



2.4

Bill C-11: Overview

Questions remain on how funds extracted from streamers will be allocated, who will be the recipients, what conditions for access will be established, and when it will happen.

Source: Senate of Canada, *Online Streaming Act in the Senate*, CARTT, Bill C-10: \$830 million in new Cancon funding is an “illustrative estimate”

Bill C-11 (*Online Streaming Act*) proposes to update the Broadcasting Act and incorporate Internet distributed television into regulation on equal footing with the conventional Canadian broadcasting system.

Primary Goal: get foreign streaming giants to contribute appropriately to the system we have created here in Canada.

Potential Impact: more funding from streamers for Canadian content, which will add jobs, encourage innovation and engage Canadian producers – and hopefully increase their IP ownership.



2.5 Balancing of Bill C-11

The CRTC and the industry have faced 50 years of disruptions within this system and have always found ways to navigate through disruptive challenges.



- Canadian film and television regulation and policy has the difficult task of balancing the interests of Culture and Industry, always finding challenges in doing both.
- One question is whether the CRTC can develop the mix of incentives that will harness **both** the **Canadian and foreign producers** into building quality Canadian content, some of which can be globally relevant.

2.6

Workforce

Film and TV production is becoming even more sophisticated. With demand harder to predict, effective collaboration among all stakeholders becomes crucial.

SOME CHALLENGES:

Aging workforce + need for mid-career/senior talent

Retention challenges

Pathways and awareness

Need for more professional development

Lack of diversity among the workforce

New talent pipelines, workflows

The industry is addressing challenges with:

- Industry-wide **collaboration** and action plans
- Increased **investment** in training and infrastructure
- More **accessible training** in specific skills
- Opportunities and training programs for **equity-seeking groups**



2.7

Equity and Inclusion

Progress is being made in making the industry more equitable with increased data collection and the work of dedicated film offices and others, however there is still a long way to go.

Source: DGC, *The DGC Census 2022*

Recognition of the lack of data collection across the industry, and new initiatives to collect data.



18.3%

of respondents identify as BIPOC. Showed BIPOC were underrepresented among members and will be used as a baseline and to inform policy to create a more equitable guild.

Equity-focused film offices continue advocacy, ensure accountability and move the industry forward.



INDIGENOUS
SCREEN
OFFICE

FILM OFFICES



DSO
Disability Screen Office

2.8

Environmental Sustainability

Global leaders may prioritize production hubs that have workforces and infrastructure that are equipped to produce sustainably. Canada must be out in front.

Source: Sustainable Production Alliance, *Close Up Look in North America: Regional Analysis of Film and Television Carbon Emissions, 2022*

- The production sector's carbon footprint has risen with demand for production services.
- Fuel consumption is responsible for the bulk of the production industry's impact on the environment.

On average, for one episode of a one-hour scripted drama filmed in Vancouver, 75% of emissions were a result of fuel consumption.

- The Canadian production industry is making efforts to become more environmentally sustainable:



- Despite these great efforts, there is still work to be done, both in Canada and globally.

Film & TV Production | **Observations**

1. We may soon see a **small slowdown or plateau in service production volume**, Canada will need to adapt and maintain a strong value proposition.
2. **Bill C-11's** exact outcomes are **uncertain with no clear framework** available. However, Canada's industry has decades of experience navigating change.
3. To maintain growth and attract productions in a competitive marketplace, there needs to be **continued collaboration on workforce and infrastructure initiatives and investment in future proofing**.
4. **Progress was made in the realization of data gaps** concerning demographic information of the industry, and **film offices, advocates and industry stakeholders are moving us towards more equity**, however there is much work to do.
5. The **environment and sustainable production will increasingly become a concern**, Canada should continue to strive to be a leader in this space and develop best practices, and incentivize producing with the environment in mind.

Video Games

Presented by: Hong Yoong



Video Games | **Key questions**

1. What is the **state of the games industry** in an emerging post-COVID environment?
2. What are the potential **impacts of Quebec's Bill-96**?
3. Have there been improvements in the **workforce and Equity, Diversity and Inclusion** (EDI) in the industry?
4. How much **attention have governments put into the games industry**?
5. Could **Dall-E/Midjourney and ChatGPT** threaten the industry?

3.1

Games on a Global Scale

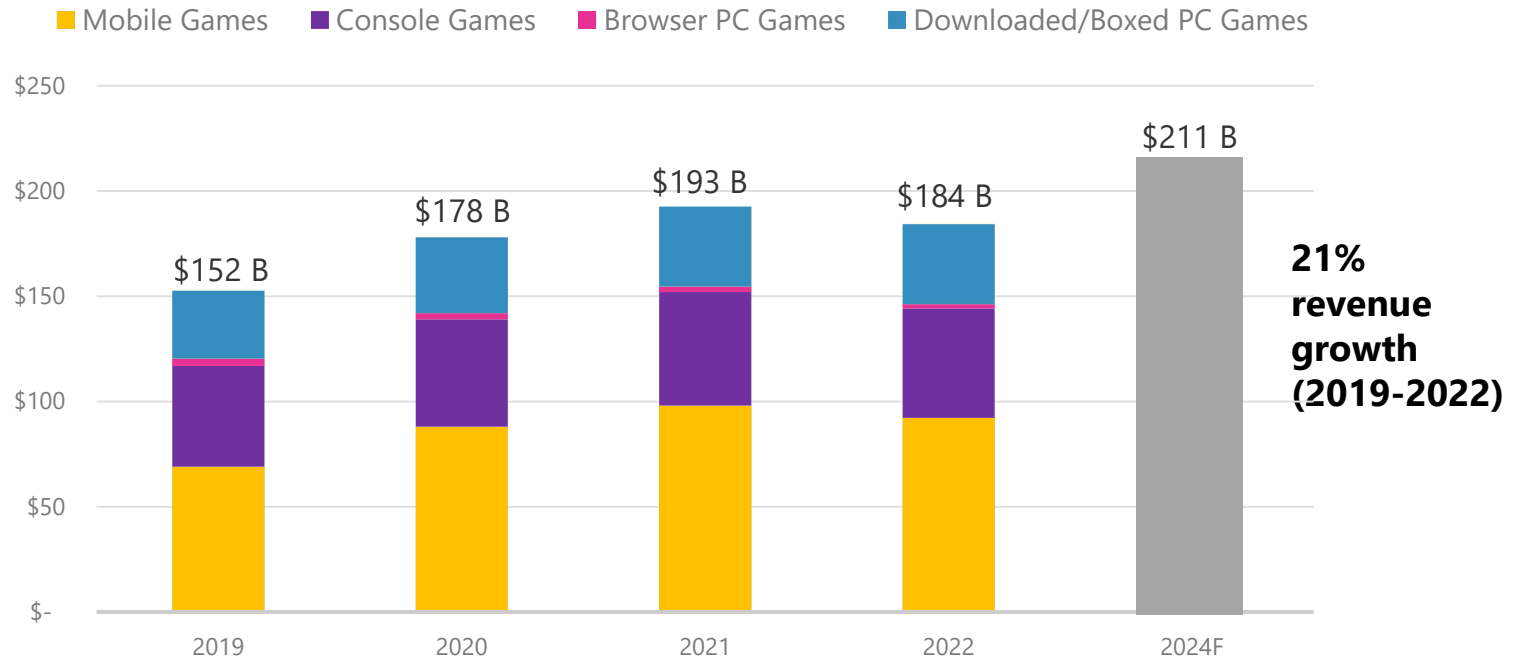
Mobile and console markets have lowest decline in 2022 compared to 2021.

2022 decline is a correction from post-COVID recovery and a reflection of broader macroeconomic trends

The games industry sustained a minor decline due to new mobile gaming policies, publishing delays, and some inflation constraints.

Source: Newzoo, *Global Games Market Report*

GLOBAL VIDEO GAMES REVENUE (USD B)

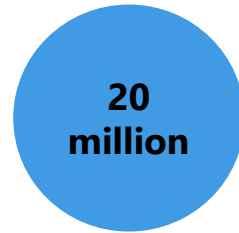


3.2

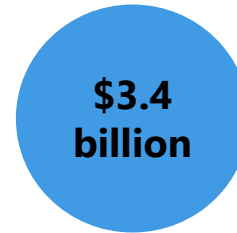
Games in Canada: A Snapshot

No industry updates in Canada until end of 2022, but the results should reflect the global games industry.

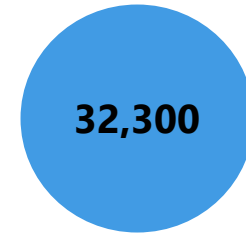
Source: ESAC and Nordicity, *The Canadian Video Game Industry 2021*



gamers in
Canada
(est. in 2022)



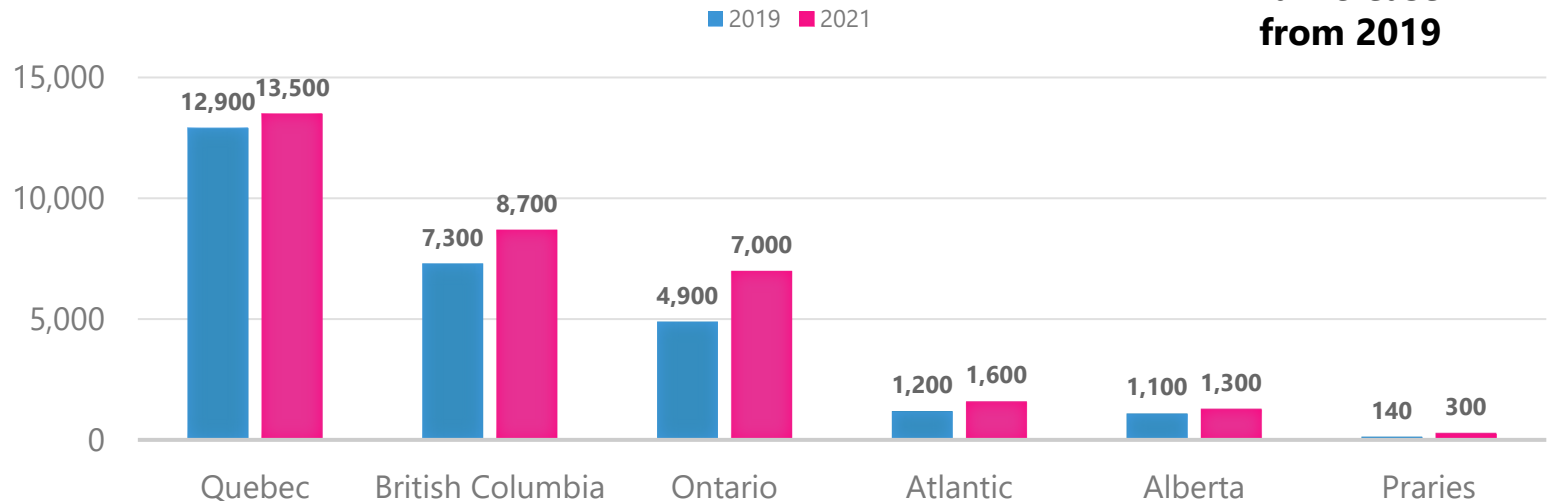
(est.) revenues
in 2021



of direct
employments in
2021



DIRECT EMPLOYMENT AT VIDEO GAME COMPANIES (CANADA), BY REGION



3.3

Investment Boom Slows Down

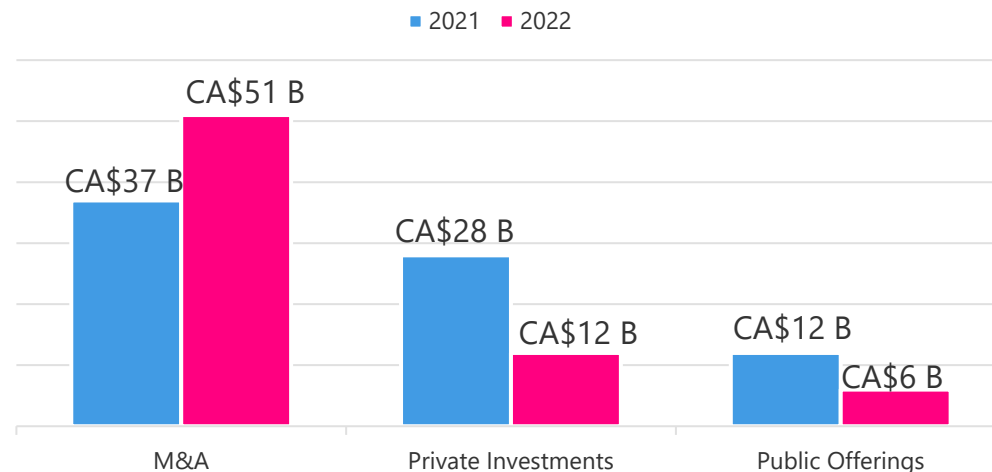
Investments have slowed down due to macroeconomic situations.

Government agencies (especially antitrust-regulators) are keeping an eye on major M&As.

Source: Invest Game, *Gaming Deals Activity Report Q1-Q3'2021*
Invest Game, *Gaming Deals Activity Report Q1-Q3'2022*

- M&A and investments = **CA\$69 B in 2022 Q1-Q3** (-11% from 2021 Year-on-Year).
- High M&A and lower private investments and public offerings are clear indicator of typical industry consolidation in response to macroeconomic recession.
- Video games industry's reaction to the global economic recession is typical to other large industries, so higher M&A deals are expected.

Video Games M&A CLOSED DEAL VALUE Q1-Q3



3.4

Impact of Bill-96

Bill 96 may provide a minor inconvenience for Quebec games industry but no direct effects have been measured yet.

Source: CBC, Gamesindustry.biz

- Quebec's Bill-96 functions as a policy to **reinforce and strengthen the French language in the province** by requiring the Quebec workforce and businesses to conduct various work activities in French.
- The bill requirements include French requirements in immigration, public services, and in law and contracts.
- The bill was **met with some concerns from game developers in Quebec**, since the industry globally is still facing labour shortages.



The impact of bill 96 is not quantified yet, but the anxiety from the bill is felt by the industry.

3.5

The State of EDI in Games

The movement to improve the industry's EDI continues to move forward but there are more work that can be done. Talks of unionization in the industry continues to grow.

Source: GDC, *State of the Game Industry 2022*.

IGDA, *DSS 2021 Diversity Report*.

- Game Developer Conference's (GDC) State of the Industry reports over **94% of respondents found EDI policies to be at least somewhat successful**.
- However, International Game Developers Association (IGDA) Diversity Report indicates that **74% of developers believe that better equal treatment is still needed**.
- GDC states that **51%** of respondents are engaged in some form of social activism.
- GDC also states that **55%** of respondents (+4% from 2021) agree that workers of the games industry should unionize.

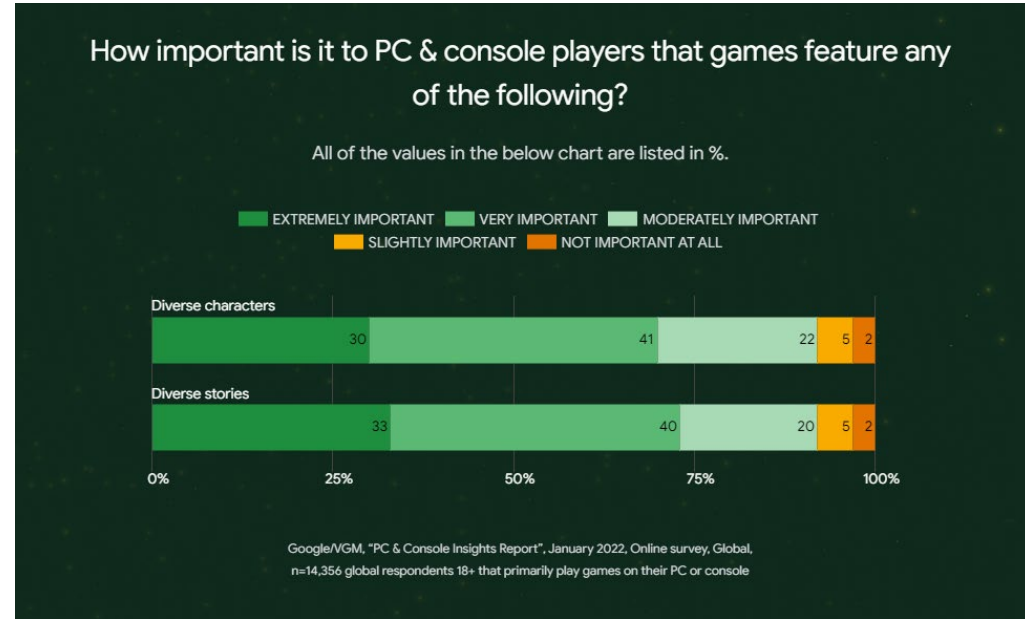
No Canadian EDI industry update until next year.

3.6

Inclusivity and Accessibility

Accessibility in games is on the rise, but demands for more inclusivity is still unmet. However, interest in this segment of video games is growing stronger.

Source: Google, *PC and Console Insights Report 2022*
GDC, *State of the Game Industry 2022*



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boyfrienddungeon.com

3.7

Games Funding Incentives on the Rise

More jurisdictions are considering or implementing various funding incentives to attract more talents and studios to their region.

Jurisdiction	Nominal Tax Rate*
Quebec	37.5%
Ontario	40%
British Columbia	17.5%
Manitoba	40%
Nova Scotia	30%-60%
United Kingdom	25%
France	30%
Republic of Ireland**	32%
Australia**	30%
Belgium**	Unknown (€36 M total)
State of New York**	35%

* *Nominal tax rate does not reflect the actual amount (effective tax rate) that companies can claim*

** *Newly implemented tax incentives in 2022/2023*

3.8

A.I. (re)Emerging Tech

Convenience of A.I. created artwork and writings leads to concerns about intellectual property and ownership. Games industry is still on the fence about this tech.

Source: NintendoLife, Wired



Video Games | **Observations**

1. While the video games industry's **growth slowed down in 2022**, most factors contributing to the issue were **from external factors** rather than a decrease in the demand for video games products.
2. **Interest in the industry is still strong** in the private sector and governments of various jurisdictions despite of recession fears.
3. Inclusive gaming, both in **EDI policies and content creation, continued to progress in 2022**.
4. (Re)emerging **A.I. technology may be a cause for concern for other digital media sector**, but the video games industry is still on the fence concerning this technology.

Music

Presented by: Zoe Brown

Music | **Key questions**

1. How **has the industry fared** as we begin to emerge into a post-pandemic environment?
2. How are digital trends impacting **consumption and rights**?
3. Is the **traditional ecosystem threatened by growing trends in entrepreneurship**/self-production?
4. What are the potential **impacts of Bill C-11**?
5. What initiatives and trends are taking place around **advancing equity and environmental sustainability** in the music industry?

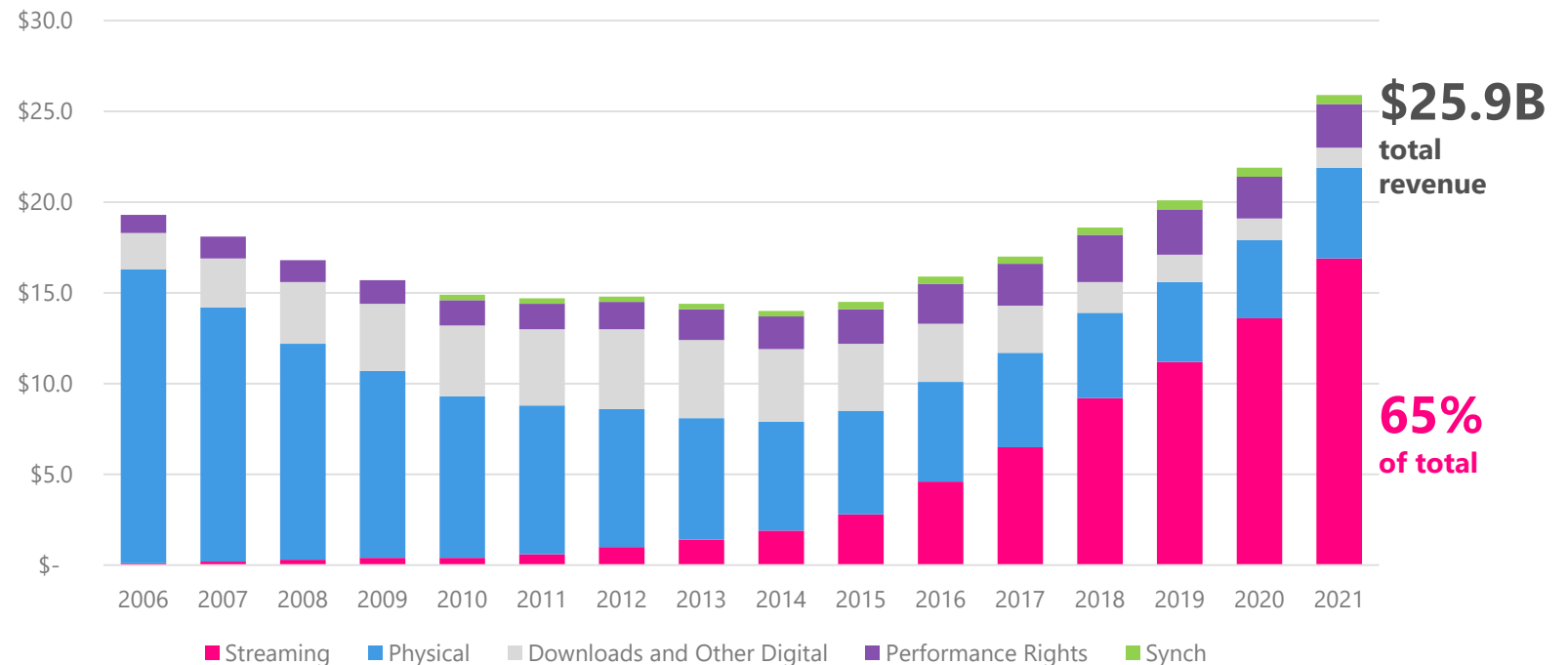
4.1

Snapshot of the Global Recorded Music Industry

Most industry segments have bounced-back following COVID-19. Paid streaming subscriptions continues to fuel growth.

Source: IFPI, *Global Music Report* (2022)

GLOBAL RECORDED MUSIC INDUSTRY REVENUES (US\$ B)



2020-2021

+24.3%
Streaming

16.1%
Physical

-10.7%
Digital
downloads

4.0%
Performance
rights

22.0%
Sync

4.2

Pulse Check on Music in Canada

Canadian recording revenues are recovering post-pandemic. Live music still facing recovery challenges with some success on the horizon.

Source: IFPI, *Global Music Report (2022)*, Music Canada, [Global News, "The live music industry is in big trouble"](#); [Live Nation](#); OAC and Nordicity, *Market Development and Touring Program Needs Assessment*; CLMA, *Live Music: Public Perceptions Fall/Winter 2022*

STATE OF RECORDED MUSIC



\$583.6 revenues (USD)

↑ 18% streaming

↑ 11.4% physical sales

STATE OF LIVE MUSIC

- Challenges abound: **inflation, artist burn-out, tour cancellations, venue closures, labour shortages, audience hesitation**
- Amid challenges:



Double-digit increase in
2023 ticket sales



New research to address
labour shortage

4.3

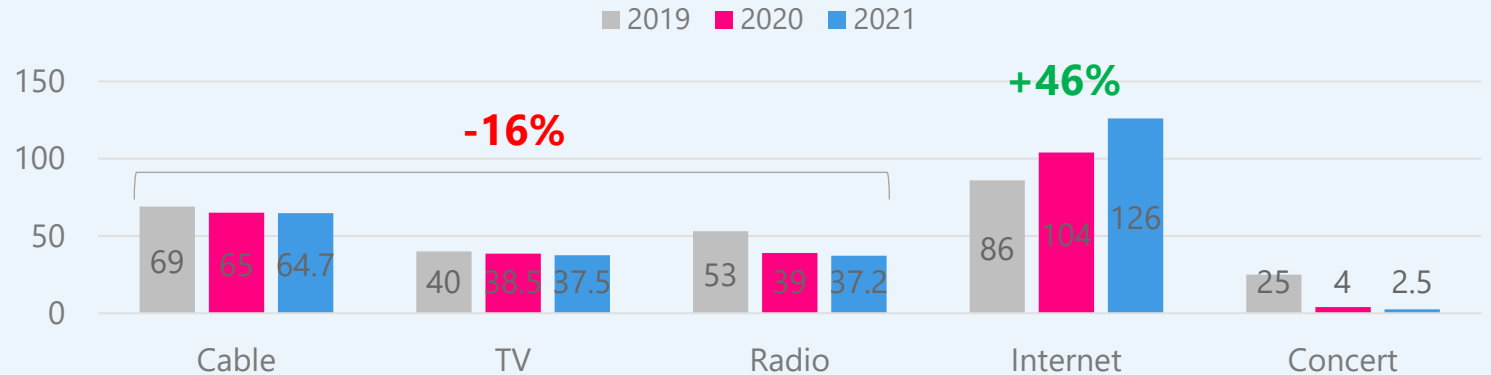
The State of Music Rights

Royalties from conventional sources remain an important revenue source for songwriters despite the rise of internet revenues.

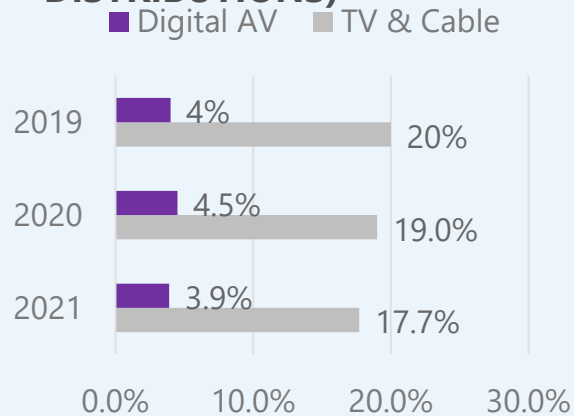
Source: SOCAN

\$67.14
Average digital streaming royalties earned by writers 2021

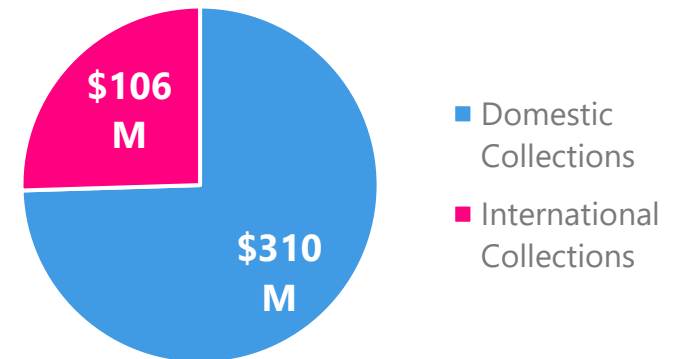
DOMESTIC PERFORMING RIGHTS REVENUES (M)



ROYALTY SHARE FOR SOCAN WRITERS (PORTION OF TOTAL ANNUAL DISTRIBUTIONS)



DOMESTIC VS INTERNATIONAL COLLECTIONS



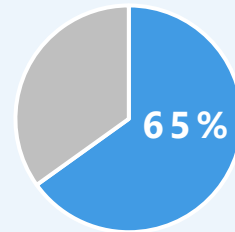
4.4

Catalogue Consumption & The Power of Sync

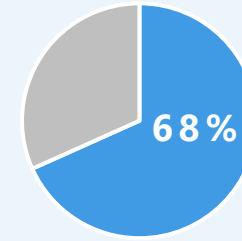
Catalogue streaming continues to take the lead. Sync proves to be a powerful discovery tool.

Source: Luminate, *Midyear Report Canada 2022*; Music Publishers Canada, *Written Submission for the Pre-Budget Consultations in Advance of the 2023 Federal Budget*

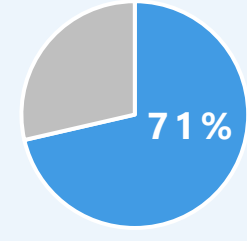
SHARE OF CATALOGUE VS CURRENT AUDIO STREAMS



2020



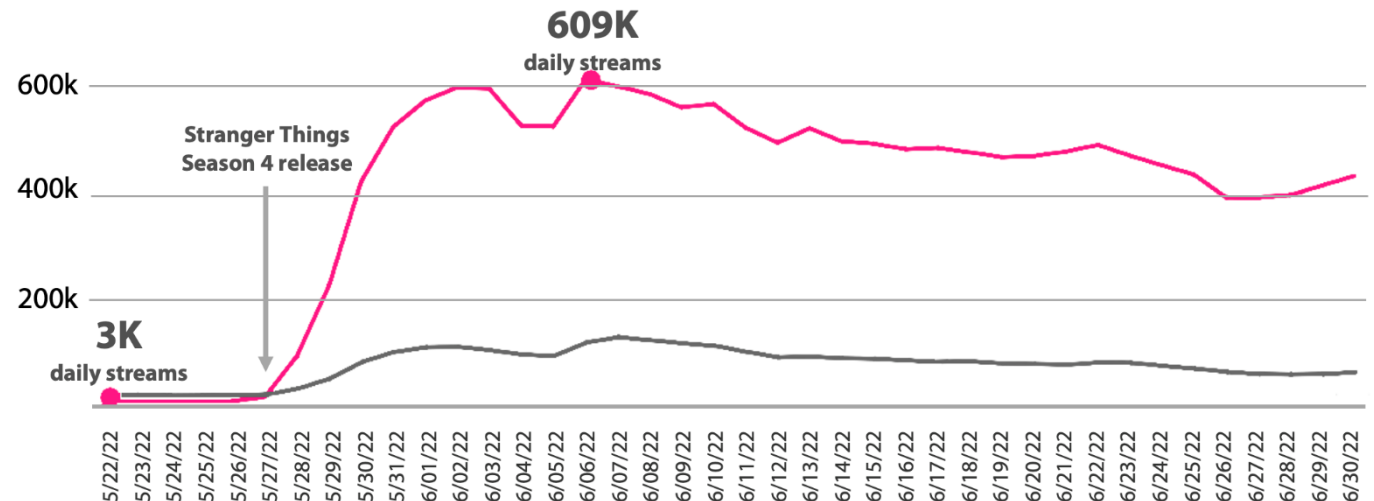
2021



2022

■ Catalogue Share ■ Current Share

CANADIAN ON-DEMAND DAILY STREAMING LEVELS FOR KATE BUSH "RUNNING UP THAT HILL"



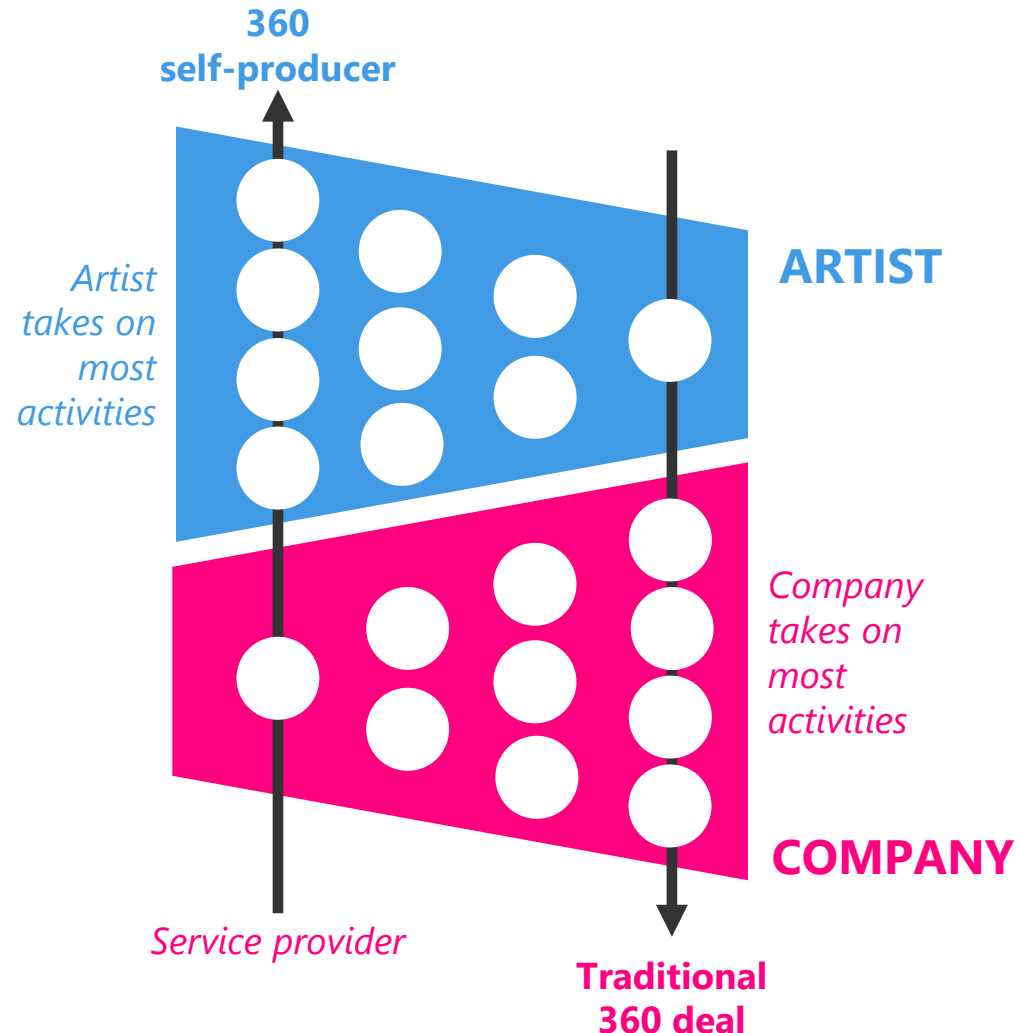
4.5

Shifting Label-Artist Dynamics

While the self-producer trend continues, it is not threatening the traditional industry.

Source: Nordicity and SODEC, *Les dynamiques entrepreneuriales dans le secteur de la musique au Québec*

THE SPECTRUM OF BUSINESS MODELS



- A multitude of business models ranging from traditional 360 deals to 360 self producers
- Not all self-producers are fully independent and still depend on elements of the traditional system

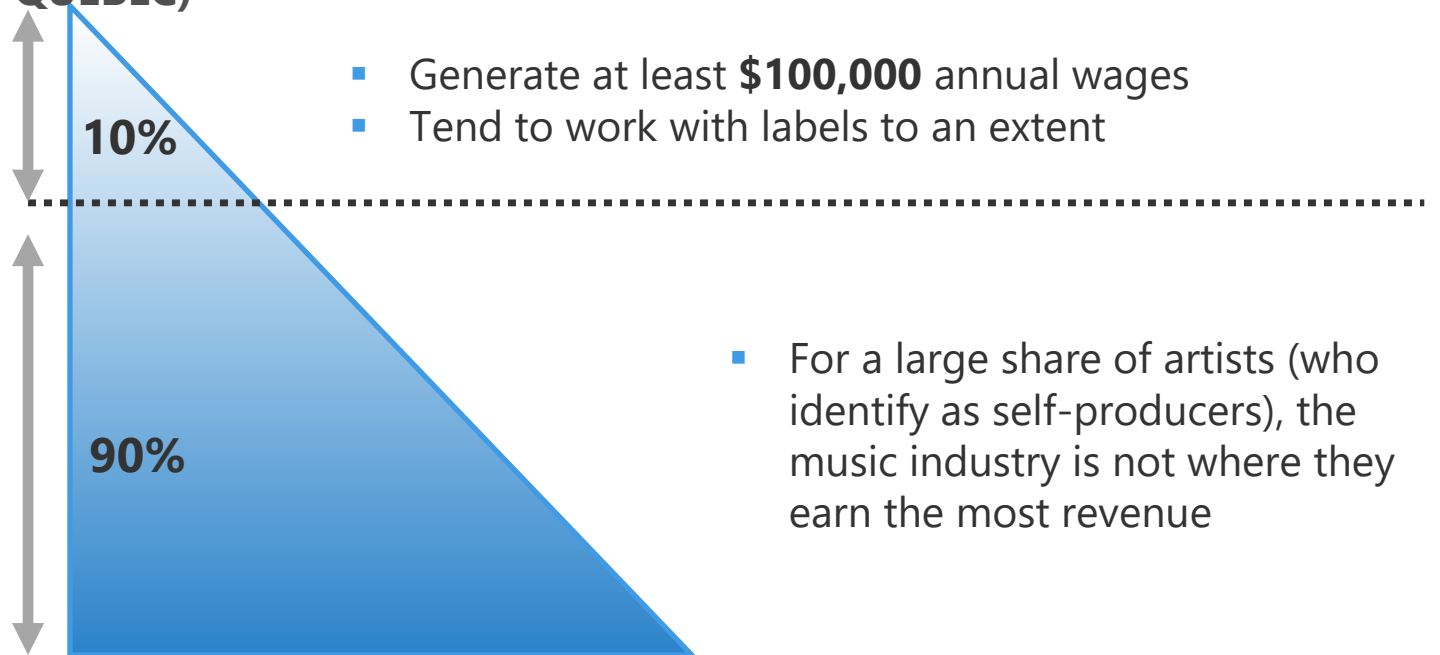
4.6

Breaking the Myth of Self-Production

The blurring of roles and success of self-producers has spurred interest in adding flexibility to funding policies and eligibility.

Source: SODEC and Nordicity, *Les dynamiques entrepreneuriales dans le secteur de la musique au Québec*; Canada, *Canada Music Fund*

VARIOUS SUCCESS OF SELF-PRODUCERS (IN QUEBEC)



FUNDING SHIFTS TOWARDS FLEXIBILITY

FACTOR

musicaction

SODEC
Québec

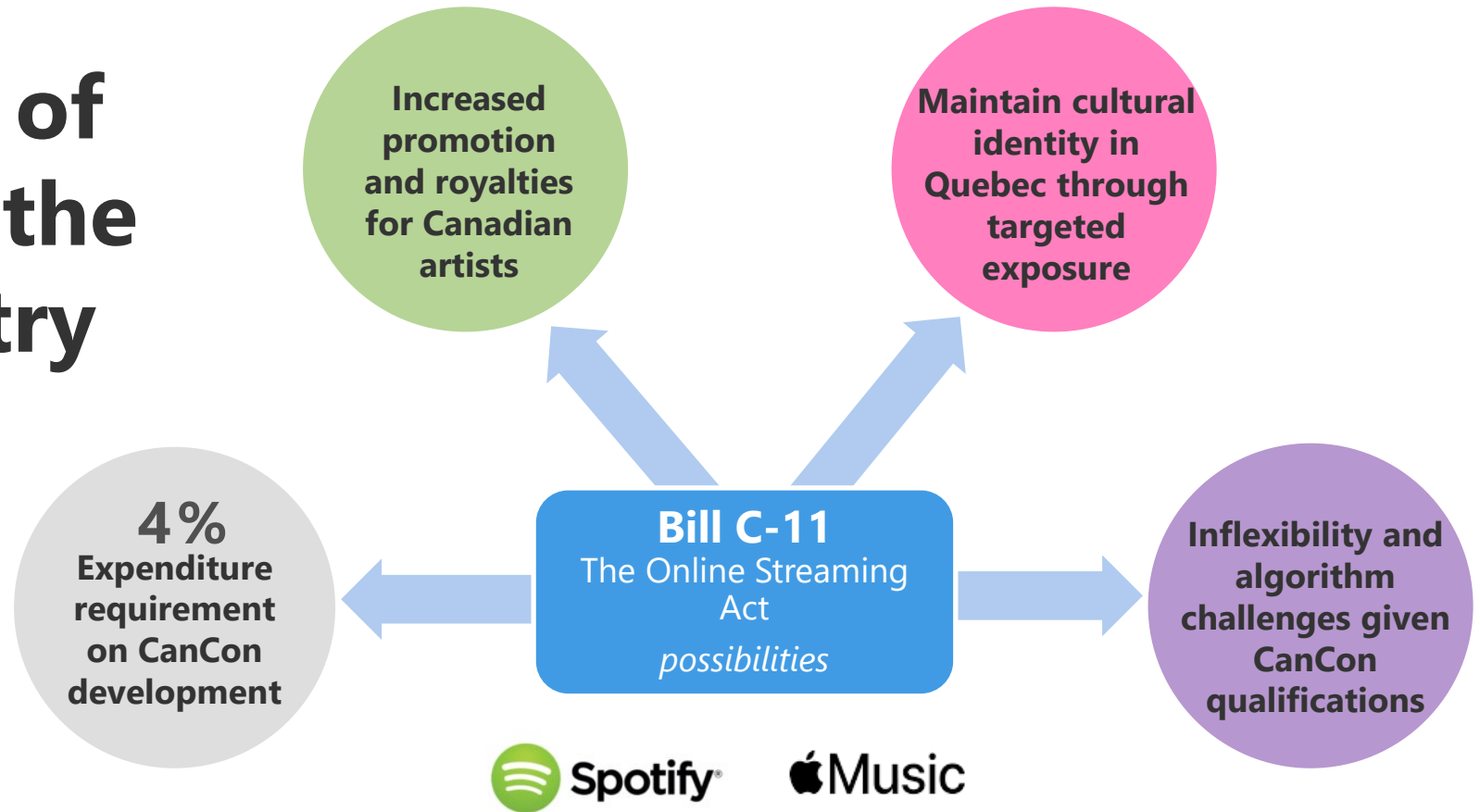


4.7

Possible Implications of Bill C-11 for the Music Industry

Bill C-11 is sparking controversy in the music industry. However, the outcomes remain to be seen.

Source: Peter Grant and CDCE, *Contribution to Canadian Content by Online Undertakings*; CBC; CIMA; Exclaim! ; Canada, *Bill C-11*



4.8

Diversity in Live Music

Research advancements have shed light on equity gaps in music. The industry is poised to take further action.

Source: CLMA, *Closing the Gap*; Women in Music, *Advancing Gender Balance in the Canadian Music Industry*

TOP REPORTED EMPLOYMENT POSITIONS AMONG LIVE MUSIC INDUSTRY WORKERS

White	IBPOC
Music Venue Owners	Artist Management
Music Promoters	Professional Services
Live Event Producers	Booking Agent Roles
Music Festival Programmers	

↑ *gatekeeping positions*

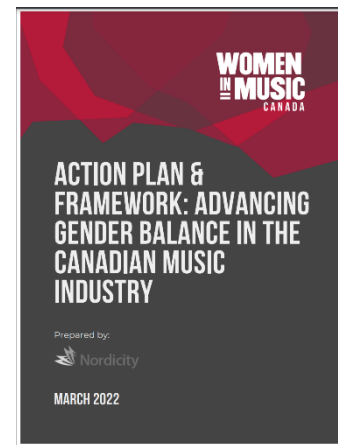
\$273.5 M

"Missing" GDP contribution of IBPOC workers

\$11,700

Wage gap between white and IBPOC workers

RECOMMENDATIONS AND INITIATIVES



ADVANCE
CANADA'S BLACK MUSIC BUSINESS COLLECTIVE

National Indigenous Music Office

4.9

Moving Towards Sustainability

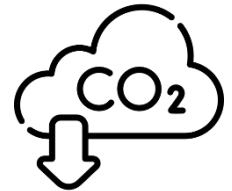
Growing awareness and eco-consciousness is leading to greater commitment and advocacy among artists and other industry players.

Source: OAC and Nordicity, *Market Development Report*; UNEP, *As climate crisis worsens, musicians push for change*; Rolling Stone



Growing eco-tourism movement is impacting the way the industry thinks about live concerts and tours.

Many festivals and companies are **committing to becoming net-zero.**



The advocacy organization hosted its **first Canadian summit in Oct 2022.**

Global campaign *Act Now – Speak Up* **encourages music fans to become environmental advocates.**



Music | **Observations**

1. The music industry is **recovering from the pandemic**, but **live music is still challenged**.
2. Digital continues to be a major factor in industry growth. However, artists still earn a small share of streaming meaning **other revenue opportunities are still needed**; particularly when paired with the challenges in live music.
3. The rise of self-production and entrepreneurship in the industry is inciting **more flexibility in funding programs**.
4. The **impact of Bill C-11** on promoting Canadian artists remains to be seen.
5. The industry still has a ways to go in terms of equity and environmental sustainability. More research has produced **tangible recommendations in place to help move the industry forward**.

Overall Observations & Conclusions

5.1

Overarching Observations

- Following the pandemic, we are entering a new period, with some recovery but ultimately more of a **need to reset, reevaluate and adjust to a new normal**.
- Incoming policy changes will contribute to the need to reset and reevaluate:
 - Bill C-11's ultimate impact on film/tv and music is still murky but **could greatly improve prospects for Canada creatives**.
 - In games and film, other countries are catching up to Canada through incentives and more comprehensive policies. **Effective collaboration between governments and the creative industries** is key to survival and prosperity.
- We still have a lot of work to do to in achieving more equitable and environmentally sustainable industries across these three sectors, however **progress is being made slowly but surely**.

5.2

In Summary

In a phrase, what can we conclude about what we face in 2023?

DM@X 2016 – “light grim”

DM@X 2018 – “scary global”

DM@X 2019 – “intervention imperative”

DM@X 2020 - “be bold, adapt or starve?”

DM@X 2022 – “riding the wave or just hanging on”

DM@X 2023 –

Adapt. Repeat.

Appendix: Traditional Media

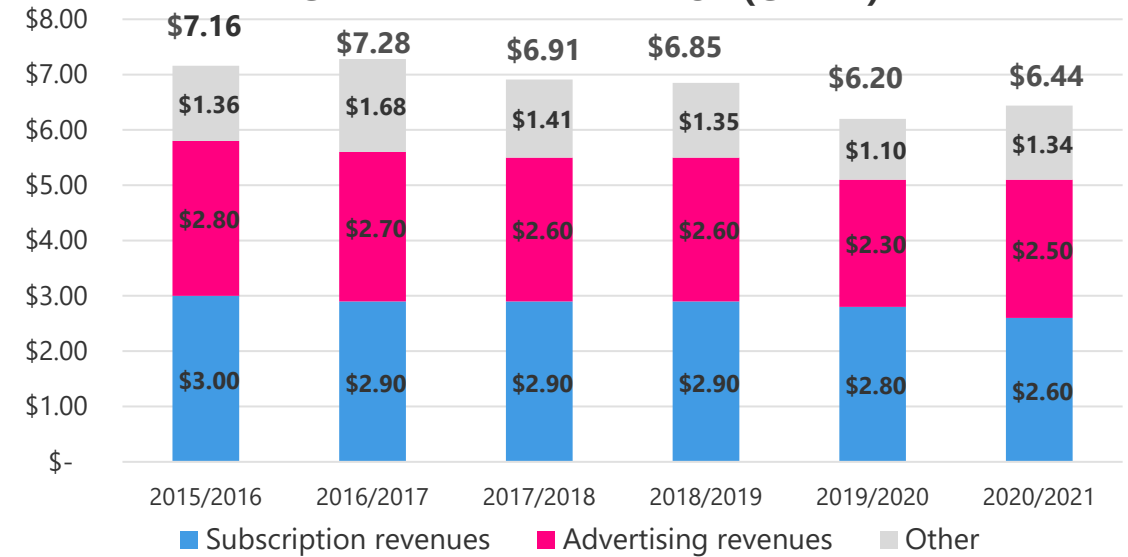
This section contains material pertaining to the Traditional Media at the Crossroads panel at the 2023 DM@X Conference. The following slides present metrics comparing traditional broadcasters and streaming services, as well as threats to traditional media's revenue and how broadcasters are adapting to new changes and disruptions. These slides complement but are separate from the Film & TV Production section of this report.

Revenue: Traditional vs. Streaming

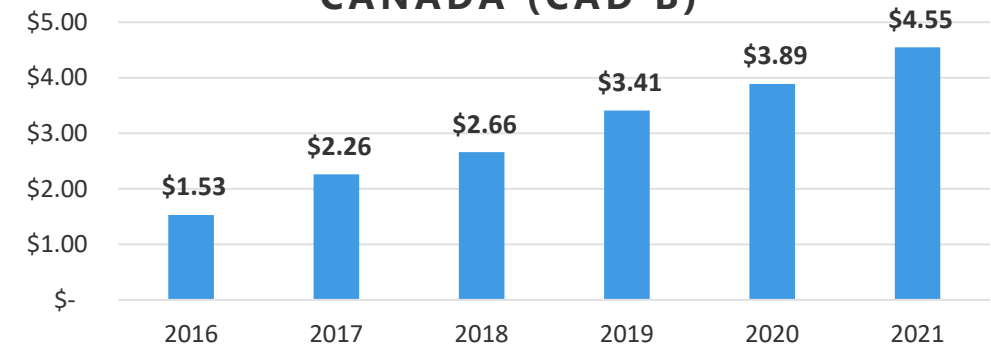
Although 20/21 saw a bit of rebound for traditional TV, internet TV/streaming is catching up to traditional broadcasters.

Source: CRTC, *Communication Market Report 2021*

CANADIAN TV REVENUE (CAD B)



**INTERNET-BASED VIDEO
SERVICES/STREAMING REVENUE IN
CANADA (CAD B)**

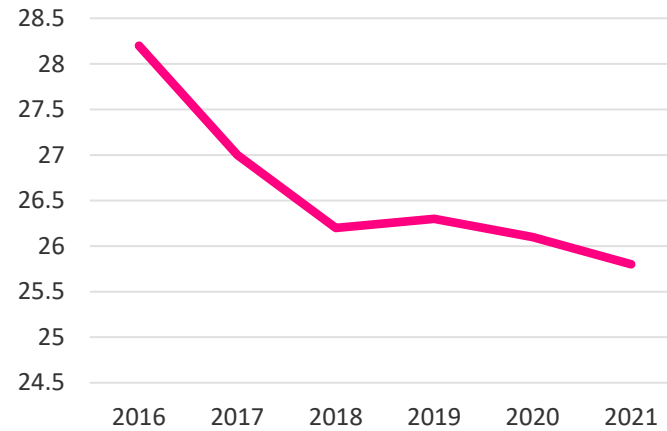


Viewership: Traditional vs. Streaming

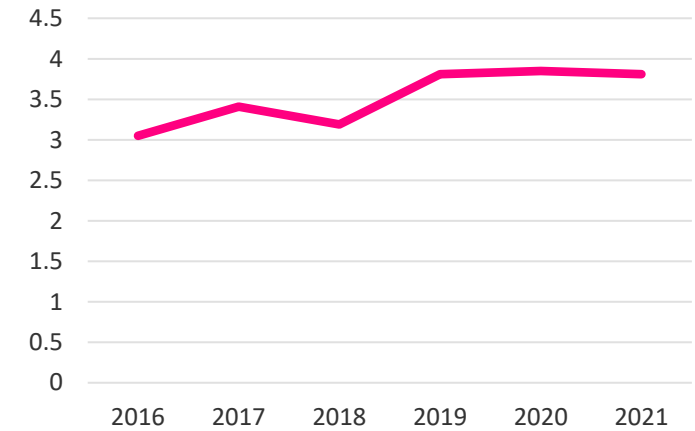
From 2017 to 2021, there was a decrease in hourly weekly viewing of traditional television, however it still has a higher viewing time than streaming.

Source: CRTC, *Communication Market Report 2021*

HOURS SPENT VIEWING
TRADITIONAL TV (WEEKLY)



HOURS SPENT VIEWING INTERNET
TV/STREAMING (WEEKLY)



Traditional TV Overall Increase 2017-2021

↓ **-9%**

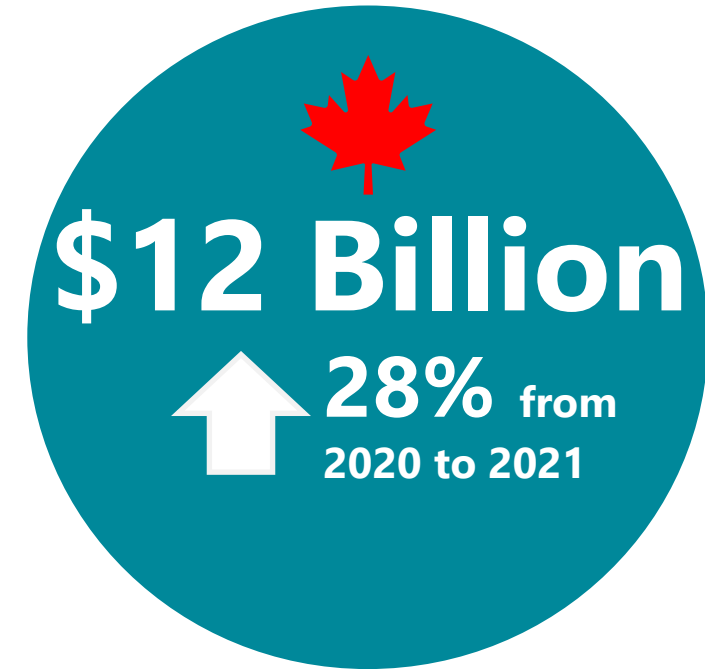
Internet TV/Streaming Overall Increase 2017-2021

↑ **+25%**

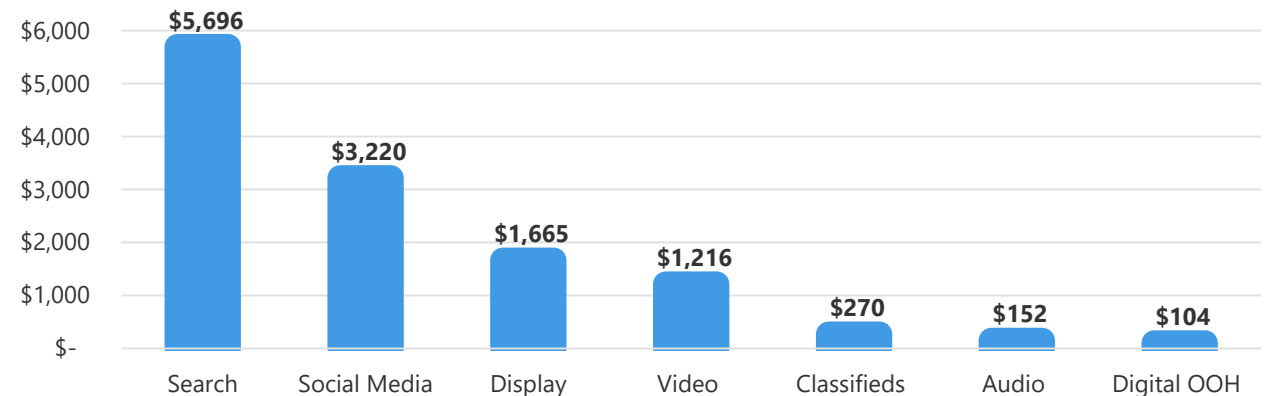
Internet Advertising Revenue Continues to Rise

Internet advertising continues to soar – eroding more of broadcasters' ad revenues.

Source: IAB, 2021 Internet Ad Revenue Survey



INTERNET ADVERTISING REVENUE BY CATEGORY



AVOD/FAST Growth & Expansion

AVOD is growing in Canada and globally as consumers become more budget-conscious and look for more convenience all while streamers look to drive profits.

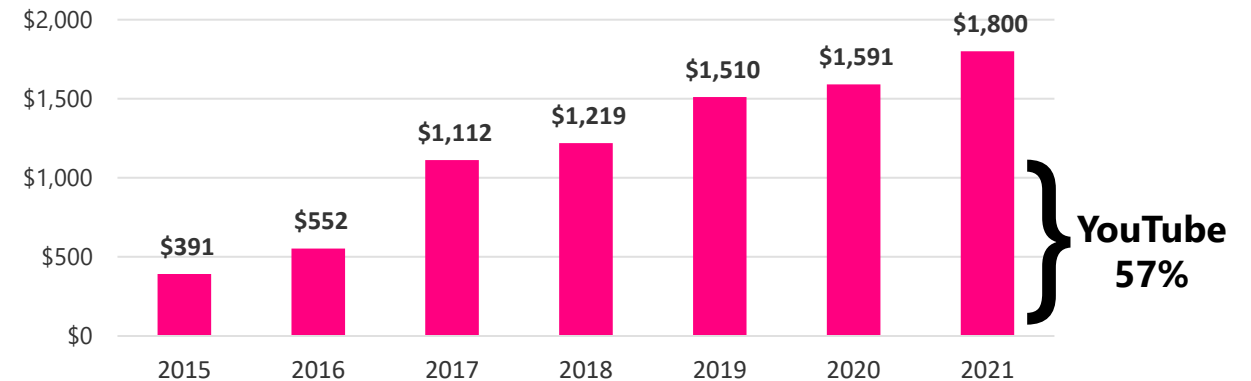
Source: CRTC, Communication Market Report 2021, eMarketer, Video User 2022

AVOD=ad-supported video on demand

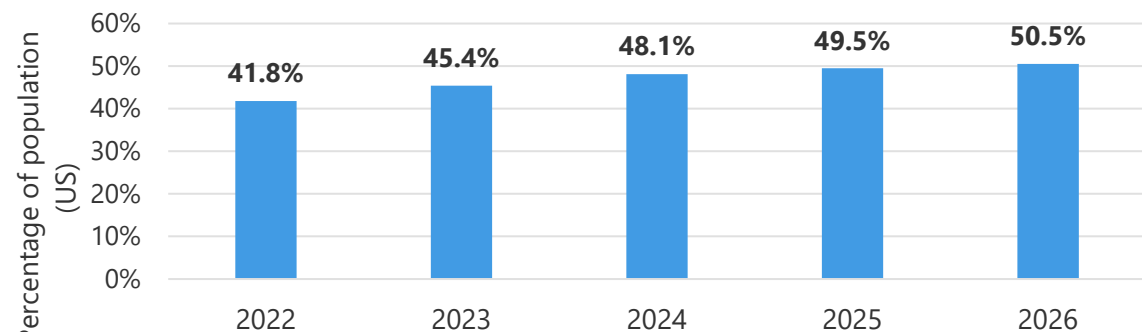
FAST=free ad-supported television; offer linear channels and on-demand content

Connected TV=any device that connects a television to the internet (e.g., Smart TVs)

ESTIMATED REVENUES IN CANADA OF AVOD SERVICES (CAD \$M)



U.S. AVOD PENETRATION



AVOD/FAST & Advertising

Advertisers will flock to new AVOD options, and SVOD/AVOD platforms will see additional revenues.

Source: Deloitte Insights, *Everyone's watching: AVOD finds an increasingly receptive audience*; Reuters, *Netflix's forecast in focus as streaming pioneer set to launch ad-supported tier*

Advertisers look to AVOD for...

- Access to new/varied audiences, especially younger demographics
- Ability to capitalize on the widespread use of connected TV
- Low barrier of entry/lower costs
- More opportunities for personalized and targeted ads

Plan Features	Basic with Ads	Basic	Standard	Premium
Monthly Price (USD)	\$6.99	\$9.99	\$15.49	\$19.99
Resolution	720p HD	720p HD	1080p HD	4K+HDR
Watch on Your Laptop, TV, Phone, and Tablet	✓	✓	✓	✓
Easy Change or Cancel	✓	✓	✓	✓
Downloads		✓	✓	✓
Ads	✓			

**\$1.7 B
(USD)**

in estimated
U.S./Canada ad
revenue for
Netflix by 2025

Canadian Broadcasters Adapting

Traditional broadcasters are already finding ways to pivot to these changes and employ new technology and models to increase ad revenues.

Traditional Broadcasters already have and/or are adapting to AVOD.

- CBC Gem / CBC News Explorer
- CTV and Global offer some select programming for free with ads.
- Corus is Paramount's domestic partner in PlutoTV.

Broadcasters are also using advanced advertising to increase revenues. For example:

- Linear optimization: provides insights to advertisers on what particular demographic/segments are watching so they are able to tailor ads to them.
- Virtual in-content advertising: using AI, allows for the insertion products into a program during post-production.



About Nordicity:

With offices in Toronto, Vancouver and London (UK), Nordicity is a leading international consulting firm providing solutions for economic analysis, strategy and business, and policy and regulation across the arts, culture and heritage, and digital and creative media industries.

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